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INSTRUCTIONS FOR USE OF RECORDS  
SURVEY WORK SHEET (Form No. 138)

In order to prepare comprehensive Records Control Schedules and to properly analyze and evaluate the results obtained it is essential that a Work Sheet be prepared for each records series as outlined below:

- a. Date Enter the current date of the survey.
- b. Office, Division, Branch, and Section. Enter the organizational elements down to the unit maintaining the files.
- c. Location. Enter building name or number and room number.
- d. Name of File. The title selected for the file series should be descriptive, self-explanatory, and consistent with the terminology of the office using and maintaining the file.
- e. Custodian. Enter name of the custodian or the person who is responsible for the files.
- f. Description. This is the most important factor involved in conducting a records disposition survey. The Area Records Officer should obtain answers to questions such as these: What is the purpose or use of the record? Where does it originate and to what offices is it distributed? What is its relationship to other records? What is the frequency of use? Such questions are obviously necessary for a competent appraisal of the records. The importance of accuracy and completeness in this detail cannot be over emphasized if proper values are to be assigned to records.
- g. Filing Arrangement. Record the filing arrangement of the record series. This should be recorded in brief statements such as: "Alphabetically by Surname," "Alphabetically by Subject," "Numerically by Requisition Number," etc.
- h. Inclusive Dates. Enter the date (year only) of the oldest document in the series and the date (year only) of the most recent documents.
- i. Size of Records. Check in appropriate squares the size of the Records and enter the linear feet of records in the box provided. Linear feet of records recorded on Survey Sheets should be the actual measurement regardless of the size of the record. Later, when preparing the Records Control Schedule this footage will be converted to cubic feet in accordance with the attached table of standard measurements (See exhibit No. 1)
- j. Equipment Occupied by Records. Check in the appropriate square the type of filing equipment housing the records and enter the number of frames, trays, shelves, etc. utilized.

k. Remarks. This space is useful for recording ideas, conversations, comments, or other information pertaining to the record series not included elsewhere on the work sheet. Such bits of information often aid materially in the evaluation process or in solving a record problem.

## INVENTORY OF FILING EQUIPMENT

TO: RECORDS MANAGEMENT STAFF, MANAGEMENT STAFF FROM: (OFFICE, DIVISION)

| TYPE OF EQUIPMENT                         |                      | NO. | TYPE OF EQUIPMENT                            |                  | NO. |
|---|----------------------|-----|--|------------------|-----|
| SAFE FILES,<br>LEGAL SIZE                 | 4 DRAWERS            |     | CARD<br>CABINETS<br>(3X5)<br><br>CONTINUED   | 10 DRS.-DBLE.TRY |     |
|   | 3 DRAWERS            |     |  | 12 DRAWERS       |     |
|   | 2 DRAWERS            |     |  | 15 DRAWERS       |     |
| SAFE FILES,<br>LETTER SIZE                | 4 DRAWERS            |     |  | 18 DRAWERS       |     |
|   | 2 DRAWERS            |     |  | 20 DRAWERS       |     |
|   | 2 DRAWERS            |     | CARD<br>CABINETS<br>(5X9)                    |                  |     |
| NON SAFE FILE<br>CABINETS,<br>LEGAL SIZE  | 5 DRAWERS            |     |  | 1 DRAWER         |     |
|   | 4 DRAWERS            |     |  | 2 DRAWERS        |     |
|   | 3 DRAWERS            |     |  | 3 DRAWERS        |     |
| NON SAFE FILE<br>CABINETS,<br>LETTER SIZE | 2 DRAWERS            |     |  | 4 DRAWERS        |     |
|   | 5 DRAWERS            |     |  | 6 DRAWERS        |     |
|   | 4 DRAWERS            |     |  | 7 DRAWERS        |     |
|   | 3 DRAWERS            |     |  |                  |     |
|   | 2 DRAWERS            |     |  |                  |     |
| VISIBLE<br>SAFES                          | 10 SLIDES OR MORE    |     |  |                  |     |
|   | 9 SLIDES OR LESS     |     | CARD<br>CABINETS<br>(4X6)                    |                  |     |
| VISIBLE<br>CABINETS                       | 10 SLIDES OR MORE    |     |  | 1 DRAWER         |     |
|   | 9 SLIDES OR LESS     |     |  | 2 DRAWERS        |     |
| MAP-PLAN<br>CABINETS                      | SECTIONS, 5 DRAWERS  |     |  | 4 DRAWERS        |     |
|   |                      |     |  | 6 DRAWERS        |     |
| SAFE<br>FILES<br>CARD                     | 5 DRS.-3X5 OR 5X9    |     |  | 8 DRAWERS        |     |
|   | 8 DRS.-16 COMP.-TAB. |     | MISCELLANEOUS<br>(2 DOOR SAFE, VAULTS, ETC.) |                  |     |
| CARD CABINETS<br>TABULATING               | 10 DRS.-20 COMP'TS.  |     |  |                  |     |
|   |                      |     |  |                  |     |
| MICROFILM<br>CABINETS                     | DRAWERS              |     |  |                  |     |
|   | DRAWERS              |     |  |                  |     |
| CARD<br>CABINETS<br>(3X5)                 | 1 DRAWER             |     |  |                  |     |
|   | 2 DRAWERS            |     |  |                  |     |
|   | 3 DRAWERS            |     |  |                  |     |
|   | 4 DRAWERS            |     |  |                  |     |
|   | 6 DRAWERS            |     |  |                  |     |
|   | 8 DRAWERS            |     |  |                  |     |
|   | 9 DRAWERS            |     |  |                  |     |


REMARKS

SECRET

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## RECORDS SURVEY WORK SHEET

|   |   |   |
|---|---|---|
| OFFICE, DIVISION, BRANCH, SECTION<br><i>Office of Public Affairs, Services Division</i>   |   | LOCATION<br><i>1215 - J.P.</i>                        |
| NAME OF FILE<br><i>Division Subject File</i>  | CUSTODIAN<br> |   |
| DESCRIPTION (Function of files, value, frequency of use, form numbers and letters, and other data, give date.)<br><i>File contains general correspondence, memorandums, reports and other documents concerning personnel, budget, training, work loads, production and related subjects. These records are accumulated for planning and administrative purposes in carrying out the functions of the Division. Much of the outgoing material originates at the Branch level and is forwarded through the Division to the Office of the Chief for review, signature and mailing. Check his files for coverage of Division functions.</i> |   |   |
| <i>The files are referred to frequently during the calendar year but reference declines rapidly thereafter.</i>   |   |   |
| FILING ARRANGEMENT<br><i>Alphabetically by subject</i>  |   | INCLUSIVE DATES<br><i>1951-1955</i>                   |
| SIZE OF RECORDS   | LEGAL<br><input checked="" type="checkbox"/> 3" X 5"  | LETTER<br><input checked="" type="checkbox"/> 5" X 8" |
| EQUIPMENT OCCUPIED BY RECORDS   | SAFE<br><input checked="" type="checkbox"/> LEGAL   | CABINET<br><input type="checkbox"/> LETTER            |
| REMARKS<br><i>Have checked and found that the activities documented by these files are essentially duplicated in the Office of the Chief. These files need not be held longer than 2 years in the office. Files should be cut off at the end of each calendar year.</i>   |   | LINEAR FEET<br><i>2.5</i>                             |
|   |   | NO. OF DRAWERS<br><i>3</i>                            |

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## DATE \_\_\_\_\_

|          |  |
|----------|--|
| LOCATION |  |
|----------|--|

CUSTODIAN

DESCRIPTION (Function of files, value, frequency of use, form numbers and titles, and other descriptive data.)

|                 |
|-----------------|
| INCLUSIVE DATES |
|-----------------|

LINEAR FEET

|         |
|---------|
| 5" X 8" |
|---------|

NO. OF DRAWERS

LETTER

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